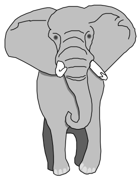
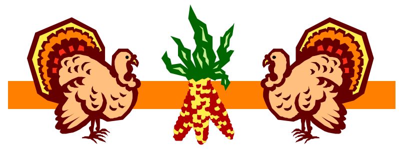
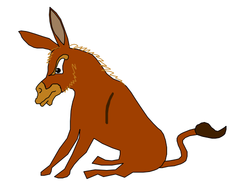
State of Hawaii Department of Human Resources Development

HRMS UPDATE







Volume 2, Issue 3 November 2000

JOB/TRANSACTIONS MODULE

♦ ***New Employee Roster Card***

A new employee roster card has been developed to give you a quick view of the information found in the personnel transactions module, as well as provide you with printing capability. The employee roster card is displayed on three panels—personal data (Part A), job/employment information (Part B) and print parameters. Effective October 2, 2000 you have access to the first two panels. The print parameter panel is currently in the development stage and will be released to you in the near future.

♦ ***Form 5 Print***

Effective September 1, 2000, the HRD director's digitized signature has been replaced with the typewritten name of our new director, Davis K. Yogi. This change has resulted in the increased font size for fields numbered 1 through 33 on the printed Form 5.

♦ ***NEW SYSTEM ENHANCEMENTS***

- Required fields have been installed since March. These fields are: ***social security number, address, zip code, empl class, FICA, group retirement code, step*** (of the salary grade), ***UAC***, and ***mail drop ID***. If these fields are not populated, an ERROR message will appear and you will not be able to save the record.

- The order and titles of the panels are the same for Hire, Applicant Hire, Job Data, Job History, and Current Job.
  - Ex. Job Data 1, Job Data 2, Job Data 3, UAC, Differentials, Ben Prgm Part, Employ Data 1, Employ Data 2

- DO NOT USE QUOTATION MARK(S) AND CARRIAGE RETURNS IN THE COMMENTS FIELD (Job Data 1). An ERROR message appears and you will not be allowed to save the record. The quotes causes problems in printing the Form 5 and the returns causes the Form 5 to be extended beyond one page.

♦ ***DID YOU KNOW THAT . . .***

- When you make changes to the

Employment Data 1 and 2 panels, it is also reflected on the Job History panels for that employee.

- In the Personal Data 1 panel, which shows the employee's address, use the address 1 field for the entire street address, including the apartment number. Do not put the apartment, room, or suite numbers on address 2 as mentioned earlier. No periods are needed.
- *Ex. 235 S Beretania St #1001*

Expected Return Date Field:

❖ Effective immediately, use the Job Transactions Comments field in Job Data 1 to capture the NTE Date for leaves without pay actions.

❖ However, if a single, current (latest action) leave without pay or DTA CHG/LOA action is inserted with the Expected Return Date field completed, the system will print the date (one day less than the expected return date) in the NTE Date field on the printed Form 5.

❖ If multiple leaves without pay and return actions are inserted, **do not** use the Expected Return Date field because the inserted date from the last reported action will be printed in the NTE Date field on the printed Form 5.

HOW TO CHANGE THE *BUSINESS TITLE* WHEN AN EMPLOYEE CHANGES POSITION:

✓ *Insert Row* to add new action
✓ Check (✔) *Position Data Override*
✓ Insert appropriate information: effective date, (if same effective date be sure to change effective sequence to "1"), action/reason, etc.
✓ When you get to the Employment Data 1 panel, the *Business Title* should be highlighted. Correct to the appropriate title
✓ Finish the new action
✓ Return to Job Data 1 and uncheck the *Position Data Override*
✓ Go to Employment Data 1 panel to double check that the *Business Title* is correct
✓ Go to Job Data 1 and save (be sure that the print box is checked)

When the form 5 is printed the new *Business Title* should be printed in the *Comments* section of the form 5 (exempt positions have generic titles printed in block 18 or 25).

It might be a good idea to continue putting the specific exempt title in the *Comments* section of the Job Data 1 panel. The Employment Data 1 panel keeps only current information. If you were to correct an older action with another title, the latest title will be pulled from the *Business Title* and printed in the *Comments* section.

Reminders:

❖ The Form 5 printing for job (actions from 7-1-97 forward) is processed every day starting at 8:30 am. Form 5 will be ready for pickup after 10:30 am. History Form 5 (actions prior to 7-1-97) are printed twice a week, Monday and Thursday, after the regular Form 5. In the very near future, we will be printing history Form 5 only once a week.

❖ Employees with more than one action on the same day will start with sequence 0, then 1, etc. Indicate the sequence in the remarks.

- ERROR Message: "Step Field is Required". The Step field is a required field. Therefore, check all records from the conversion record in the Job Data 3 panel to the most current record to make sure the Step field is entered. The only exception is exempt employees, not assigned to the salary schedule. Their records must have entries of "XX" in the Salary Administration Plan field (No entries in Grade or Step). After making the appropriate corrections, enter and save your action.
- There are work around ways to . . . .
  - Show tax exemptions, payroll #, legal authority, work week code – in the comments section if you need to show the information.

- Applicant ID starts with an "A" and follows with 10 numbers; Emplid is a 6 digit number.

POSITION MANAGEMENT MODULE

Exempt Action Reason, Type of Action, and Tracking Status Codes

PLEASE NOTE: Exempt position Action Reason (Position Data 1) and Type of Action (Position Track 1) codes all begin with "**E**". DO NOT use civil service action reason and type of action codes for exempt position actions. Statistics taken by CCR are driven by proper use of these codes.

UAC Year Field

If the effective date of a position action is 7/1/2000 or greater, remember to enter "01" in the year field in the Method of Funding panel.

Pseudo Numbers

Pseudo numbers reported to the Department of Budget of Finance (B&F) were loaded in the HRMS. Because the position number field is a numeric field, we were unable to enter the pseudo numbers in the position number field. As a result, the system assigned numeric position numbers to the pseudo numbers. A "crosswalk" table (HRMS Position Numbers Assigned to Pseudo Numbers) with data correction instructions (INSTRUCTIONS TO CORRECT PSEUDO NUMBER POSITION RECORDS) was faxed to each department affected by the load on August 15, 2000. NOTE: A listing was not sent to every department. If you have questions on whether or not you should have received a report, please contact CCR at 587-1010.

Lump Sum Budgeted Positions

Lump sum budgeted positions are budgeted and funded. These positions may or may not have an authorized FTE depending on how they are listed on B&F's tables. Data in the Authorized FTE field (Position Data HI) should match the data on B&F's BJ, BJ-1A and BT tables.

Please be careful when you enter data in the Authorized FTE field because HRD's staff does not have access to B&F's budget tables. As a result, we are unable to verify the correctness of the data entered in the Authorized FTE field.

Position Management Module Programming Changes

- **Location Code (Position Data 2)**

The system default in this field has been changed from OAH to a "blank". This change in programming was required to correct a situation where the system was defaulting **OAH** in the location code field whenever a change was made to the Department ID field. When changing values in the Department ID field, please verify that the value in the Location Code field is correct.

- **Uniform Accounting Code (Method of Funding)**
  The first five fields of the UAC are required fields to save a position record. Because a lot of our "older" position records had no funding information, the first four fields of the UAC were filled with 9's and programming logic was added to have the system populate the department field of the UAC with the appropriate department letter code based on the department ID entered on the position record.

  The system has been programmed to pre-fill the first four fields of the UAC with 9's whenever a new position is added to the system. When entering data for a new position, overwrite the "9's" with the correct information.

New Type of Action Codes

❖ **MAS** - To be used by HRD to convert existing data on position records (e.g., convert general shortage values to more defined values, island to geo location code, etc.) or to realign existing data on position records. If you have an action with the same effective date, enter the type of action code **before** the data that was entered in the Comments field for the mass update action.

For example, if you have a DCE action on the same effective date and "MAS – Location Code Update" was entered in the Comments field, the DCE action should be entered in front of the MAS type of action code (e.g., DCE; MAS – Location Code Update). Please **do not delete** the data entered in the Comments field for the MAS action.

❖ **FIN** – To be used by departments to track changes made to data in the Method of Funding Panel (e.g., change(s) in program budget ID, means of financing code, UAC, and/or percentage distributions). Note: A separate FIN tracking action (Position Track 1) is not required if it is combined with the following types of actions—DCN, DCE, CNP, CSN, CEX, CTR, and RES, **if the funding information changes on the same effective date**. However, the FIN code should be entered in the Comments block (Position Data HI) to indicate that changes have been made to the data in the Method of Funding panel.

Instructions for entering a **FIN** action are attached.

Type of Action Code Deleted

In the August 1999 HRMS update, we reported that MVG was added as a tracking type of action code. This code, MVG, has been deleted.

Position Pool ID field (Position Data 1)

Departments are no longer required to enter data in the Position Pool ID field (Position Data 1 panel). This data is now maintained in the Prog Budget ID field on the Method of Funding panel.

Transfer of Programs Between Departments

Whenever programs are transferred between departments, it is recommended that the effort be coordinated between the departments to eliminate duplication of effort. The gaining department should contact CCR to make the appropriate changes to the Department and Program Budget ID tables. Once the data has been entered in the HRMS system, the gaining department provides the organizational code and funding information (e.g., means of financing code, uniform accounting code, etc.) to the losing department for data entry. If position descriptions are not being submitted at the time of the transfer, the transfer can be reported on one SF-1 with a list containing the following information may be attached:

- Position Number
- Authorized Job Code
- Old Organization Code
- New Organization Code
- Old Program Budget ID
- New Program Budget ID
- Old Means of Financing Code*
- New Means of Financing Code*
- Old UAC
- New UAC
- Old percentage*
- New percentage*

*Required only if there is a difference between the old and the new values.

NOTE: The gaining agency should double check the data entered by the losing agency to ensure that the data entered in the system is correct. Please be advised that the gaining agency does not have get access to the position records in HRMS until the occurrence of the effective date of the transfer.

Legal Authority

Whenever a position's status changes from unbudgeted to budgeted, please remember to complete the Legal Authority field (Position Data HI).

Appeals

Please remember to:

1. Track All Incoming Requests
   a. Track appeal requests upon receipt of the notice from the Civil Service Commission (CSC).
   b. Upon notification of the hearing date and time, enter the date and time of the hearing in the Comments section for the DEPT tracking status (Position Track 2).

2. Complete the Tracking Action upon completion of the appeal.

a. Enter the effective date and the approved level.
b. Select “CSC” in the Mandated Action field if the CSC grants the appeal.
c. Do not forget to annotate the outcome of the appeal in the Comments field for the DSNF tracking status (Position Track 2). (Hint: Copy and paste the comments from Position Track 2 on to the Position Data HI Comments field.)

Hint: If the request is withdrawn, the correct sequence for Position Track 2 is as follows: DEPT, DWDA, DNSF. CCR will acknowledge with HRDR.

NOTE: DO NOT change the **Approved Level** class codes of past tracking actions with the same effective date (e.g., DCE, ARD) in Position Track 1. Keeping the approved levels at what they were approved for a particular tracking action as it provides a history of what actually happened to the position.

3. Update the position data panels as appropriate.
   a. If there is a change in class code, **correct** the Job Code (Position Data 1) and Authorized Level (Position Data HI) fields and annotate the reason for the change in the Comments field (Position Data HI) for that effective dated record. Please correct the job codes of any subsequent rows, if applicable.
   b. If there is no change in class code, be sure to annotate this fact in the Comments field (Position Data HI) for that effective dated record.

Administrative Reviews

Follow the general steps outlined for Appeals

Please remember to:

1. Enter a tracking record for all administrative reviews received.
2. Complete the tracking records upon completion. Remember to annotate Position Track 2.
3. Update the position data panels as appropriate
4. Send a copy of the administrative review letter to CCR.

See “Completion of DRTP and DWDA Tracking Statuses” article on page 7 for instructions on how to close an administrative review that’s been withdrawn by the program, appellant, or incumbent.

BU Actions

Please remember to start tracking records in Position Track 1 and Position Track 2 for **all** positions with bargaining unit issues.

BU issues include the following:

- Initial exclusion from collective bargaining

- Continued exclusion from collective bargaining
- Exceptions to the bargaining unit designation for the class
- Transfer between bargaining units
- Change in bargaining unit status from excluded to included or vice versa

Retroactive Position Actions

When entering retroactive position actions in the HRMS, **please remember to correct, rescind, and/or delete subsequent effective dated position data and tracking records, as appropriate.**

Please call CCR at ext. 7-1010, if you have questions.

Completion of DRTP and DWDA Tracking Statuses

- The tracking status, **DRTP**, is used by the Personnel Office to return paper work to the program for rework. If there is no question that the paper work will be coming back to the personnel office, leave the effective date on Track 1 blank. If the paper work is not going to be returned to the personnel office for further processing, then it is imperative that you close out the tracking on Track 1 by entering the date you returned the paperwork as the effective date. A blank effective date field in Track 1 indicates that the position action is still pending.
- The tracking status, **DWDA**, is used by the Personnel Office to indicate that a pending action is being withdrawn by the department, program, appellant or representative. The tracking should be closed out by entering an effective date in the effective date field on Track 1. The proper effective date to use is the date of notification of the withdrawal, e.g., date of letter.

  Effective date exception: For pending ARDs or APDs that are withdrawn (DWDA), the effective date of the DWDA should be the effective date of the administrative review or the appeal, had the action been completed. In either case, the Position Data HI comments field and the DWDA comment block in Track 2 should be annotated.

Changes to the Department Table

When submitting organizational code changes (e.g., addition of a new code, name changes, etc.), please provide HRD's staff five (5) business days to make the change on the department table and to update the security tree before updating your position and/or employee records.

It assist CCR in processing your request on a timely basis, please remember to provide:

- The effective date of the action;
- Desired abbreviation for descriptions (if there is a preference);
- U.S. EEO4 Function Code; and
- Program Budget ID to be attached to new organizational codes.

Reminders

In the Comments section (Position Data HI), DO NOT enter **pending** type of action codes. Records entered in the HRMS system are effective dated. Therefore, the information annotated in the Comments section should only refer to the action(s) that was/were approved for that effective date.
For example, if you're processing a redescription (DCE) and a non-delegated selective certification requirement (SCR) for a position at the same time, **DO NOT** enter "DCE; SCR" in the Comments field (Position Data HI). The SCR action is still pending approval by CCR. Upon approval by CCR, the SCR action will have it's own effective dated row added in the HRMS system.

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Department's are responsible for the accuracy of the data entered in the HRMS system. CCR's staff cannot double check each field and will only spot check certain fields.

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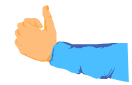
MISCELLANEOUS

New Query Views



Two new query records have been added to the Query Tool for line agency users.

- HI_JOBPER_XX_VW

  This view joins the JOB, PERSONAL_DATA, and EMPLOYMENT tables, which allows users to query general Form 5. This view does not include UAC or differential data.
- HI_POSMOF_XX_VW

  This view joins the POSITION_DATA and HI_POS_ERN_DIST tables, which allows users to query general position and method of funding information.

ERROR messages mean you cannot save a record. Whereas, ***WARNING messages*** tell you there's a discrepancy in the record and **SHOULD** be checked out, but will allow you to save the record.

Update/Display vs. Update/Display All vs. Correction Modes:

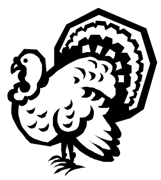
- Use Update/Display (✓) when all you want to view is the latest action and need to insert another current action.
- Use Update/Display All (✓+) when you want to view all actions and you may add a current action. BEWARE!!! The system will allow you to **modify future dated records** without being in Correction mode.
- Use Correction (✎) when you need to correct information in existing records (actions). You may also insert new actions anywhere in Job or Job History.

BEWARE!! This mode can alter existing records.

Deleting Rows

After deleting rows of data, you must **SAVE** the record. Clicking on the red "X" to end the transaction or to access another position record, **CANCELS** the transaction and the row(s) you deleted will remain on the position record.

Happy Thanksgiving,
Everyone!!!



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